TOP SECOND 100 FLEETS

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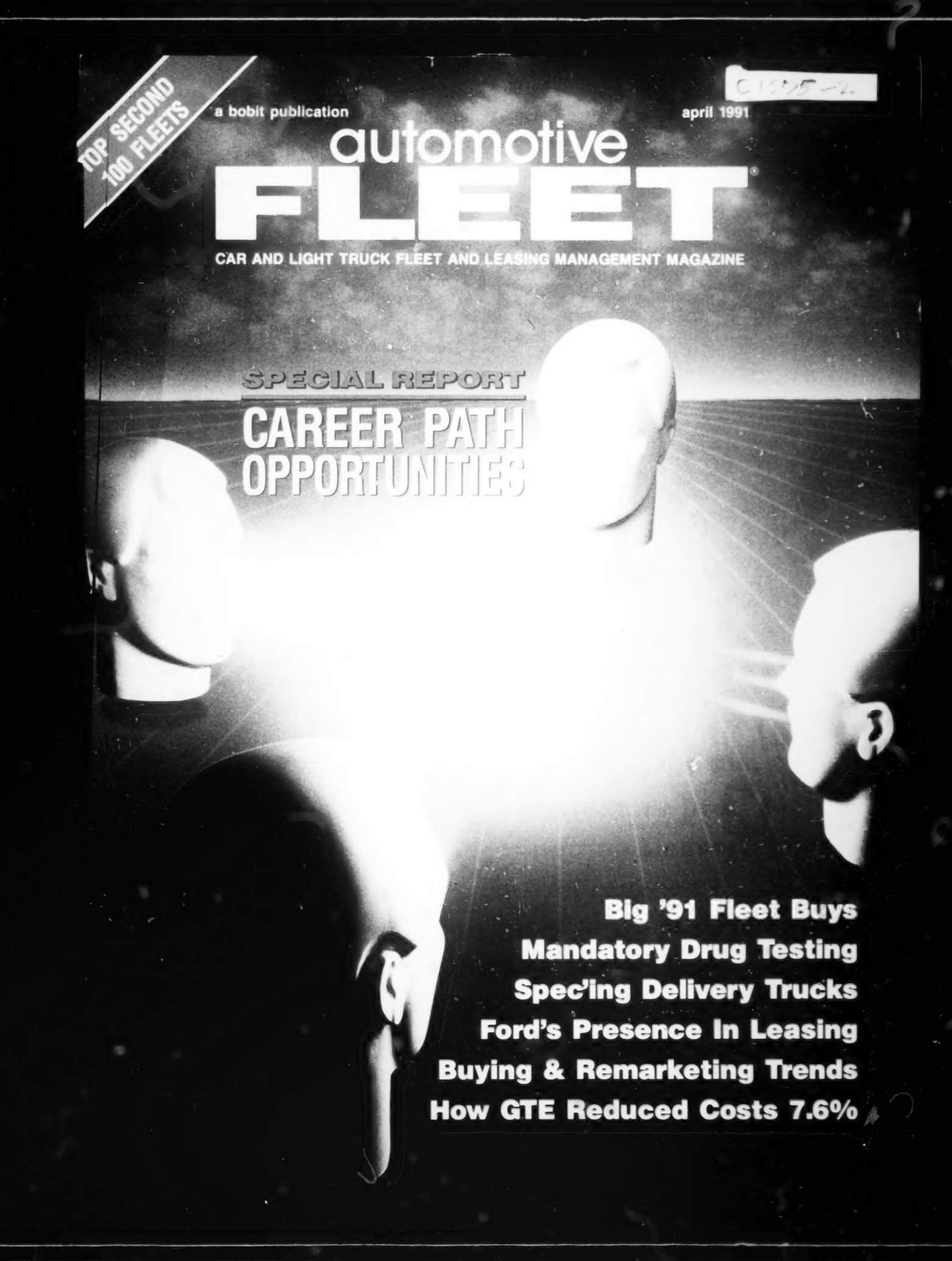
CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE



SPECIAL REPORT

CAREER PATH OPPORTUNITIES

Big '91 Fleet Buys

Mandatory Drug Testing

Spec'ing Delivery Trucks

Ford's Presence In Leasing

Buying & Remarketing Trends

How GTE Reduced Costs 7.6%

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CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

April 1991
VOL. 30, NO. 6

Influencing the management of 5,090,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.

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Automotive Fleet's *first-ever Special Report on Career Path Opportunities presents real-world examples and practical tips on increasing your professional stature.*

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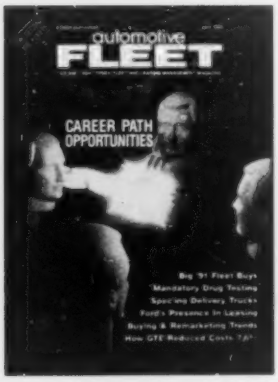
The marketing strategies that took Anglo from a start-up nine years ago to handling nearly 1.25 million consignments will continue, but the emphasis now is on expanding client services.



On the cover: What kinds of career path opportunities exist for fleet managers in a rapidly-changing economy? To get the first-hand story from several experienced fleet managers, see the Special Report, starting on page 28.

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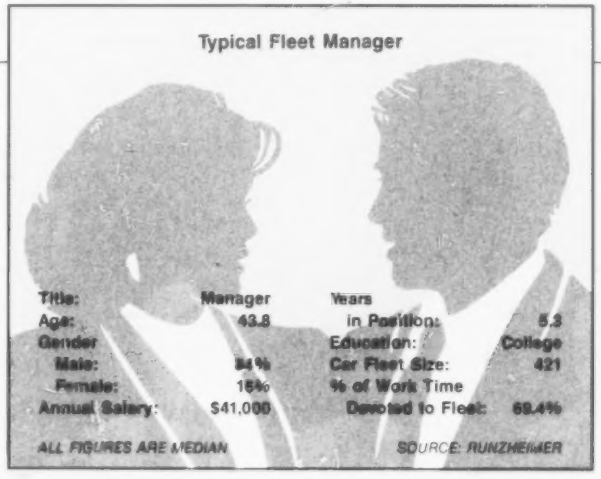
Redefining Fleet Management To "People Movement"

Fleet management must be redefined. A fleet manager's responsibilities should be expanded to encompass the entire spectrum of employee transportation and not restricted solely to the administration of company vehicles.



Fleet management has been variously described as either: a science, an unappreciated profession, a dead-end position, a stepping-stone to better things, or a job function better left to external management. In reality, it's all of these. That's the problem.

In reality, fleet management is a management function that exists solely to provide the most efficient transportation to achieve specific corporate goals. It should never be perceived as having a "life of its own."

In its ongoing attempts to justify its own existence, fleet management would do well to remember that its only purpose is to *serve management's interest*, and it's to *that* end that fleet managers should direct their efforts.

Changes have occurred in fleet management and some of them, unfortunately, have been negative. One result is that some corporate managements now question the need for fleet operations as they presently exist, and to look for simpler, less expensive alternatives.

Fleet management must stand up and face these changes squarely, and start to *manage* their departments, which according to Webster's dictionary, means, "To control the action...handle...guide...to have charge of, direct..."

Sales and service fleets are now, and will continue to be, a vital cog in the industrial engine which drives the nation's economy. As the importance of sales and service fleets increases, so too will the importance of the corporate fleet manager.

Fleet management today is a recognized profession, having evolved into quite a sophisticated responsibility as a result of computerization and other technology. But it is again at a crossroad.

Fleet management must be redefined. It's not enough to be concerned only with vehicles used in business, it must be expanded to encompass the entire field of "people movement."

The movement of goods is well-defined under the general heading of traffic management. The movement of people, on the other hand, is fragmented. Besides fleet management, the movement of people includes air travel, hotel reservations, car rentals, household goods movement, and employee relocation. Sometimes each of these areas administered within a corporation has its own staff, policies, and procedures, often reporting to different management areas. Yet they all involve the movement of people. Why not organize these various areas under a single, centralized management? The logical choice, of course, would be the fleet management area.

Not only will this provide a much-needed shot in the arm to fleet management, but it would be equally important to corporate management. Placing all "people-moving activity" under fleet management would provide cost savings, efficiency, effectiveness, and coordination, plus give corporate management the ability to control all policy through one management function.

All of these fields are tied together and the responsibility to administer this function could be best handled by a newly-established position called "director, personnel transportation," which today's fleet managers could aspire to. AF

Charging Drivers & Frequent Inspection Reduce Abuse

A company's preventive and regular maintenance programs are useless if drivers abuse their cars. According to one survey, excessive wear and tear by drivers is the leading cause of fleet vehicle breakdowns.

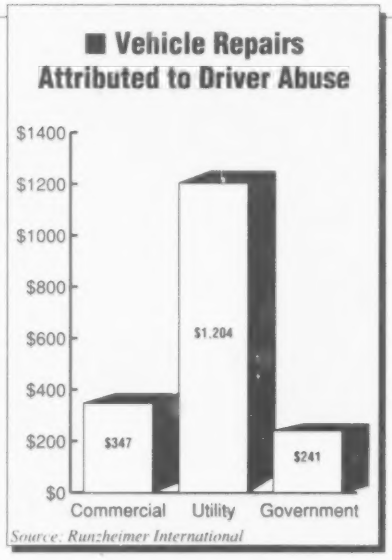
The best preventive maintenance program is almost useless if drivers abuse their company vehicles. Such abuse leads to expensive repairs that add substantially to the cost of operating a fleet.

According to a study by *Runzheimer Reports on Fleet Management*, 62 percent of the 117 fleet administrators surveyed cite driver abuse or neglect as the primary cause of vehicle breakdowns. The average cost of repairs per vehicle due to driver abuse range from $1,204 for utility fleets, $347 for business fleets, and $241 for government fleets. Driver neglect and abuse is one of the most difficult problems faced by fleet managers on a daily basis.

Drivers can abuse vehicles in several ways. They can ignore scheduled preventive maintenance servicing, delay reports of vehicle problems, alter or modify equipment, and ignore vehicle appearance.

Vehicle abuse not only increases the cost of repairs, it also depreciates the vehicle's resale value. Abused vehicles also are dangerous to drive. Brakes may be ineffective, engine power reduced, steering imprecise, and tires worn.

To deal with vehicle abuse, it is essential to motivate drivers to take better care of their vehicles. Fleet managers might even consider charging drivers for excess wear and unreported physical damage.



Charging for excess wear and tear saves the company money and encourages drivers to stick to maintenance schedules and to report minor accidents. There also may be an additional savings in insurance costs due to the improved safety performances of more conscientious drivers operating better-maintained and damage-free vehicles.

To charge drivers for excess wear, first establish the average resale value of the vehicle in "clean" condition, and then establish the actual net resale value after reconditioning charges have been determined by a knowledgeable third party. Calculate the difference between the two amounts and charge the difference back to the driver. This procedure, however, would not be practical for fleets with pool vehicles shared by a number of drivers; no single driver could be considered responsible for the vehicle, and charging for excess wear would be difficult.

Another way to get drivers to take better care of their vehicles is to establish periodic inspections. Drivers who perform pre-trip and/or post-trip inspections often cut down on such problems as poor steering and alignment, burned out headlights, worn brakes and tires, and low lubricant, coolant, and tire pressure levels. Whatever the method of improving the upkeep of vehicles, it is important to have a written policy regarding company expectations.

Still another method is to offer them the option of purchasing their vehicles when they are taken out of fleet service. For the driver, fleet vehicles can be a good buy — but only if the vehicles have been well-maintained. This method works best when drivers are given a broad selector list of makes, models, options, and accessories. Drivers would not want to buy from a limited list of cars with little optional equipment.

New Vehicle Buys Steady Despite War & Recession

The 1991 NAFA New Vehicle Acquisition Survey says the majority of commercial fleets see stability in their fleets' size, and 17 percent even plan fleet growth. Initial cost and loyalty are key factors influencing their buying decisions.

Fleet managers responding to the National Association of Fleet Administrators 1991 New Vehicle Acquisition Survey say that 51 percent of their fleets will have no change in size during the coming year, while 17 percent plan an increase in the number of vehicles in their fleets.

In 1990, 20 percent of respondents said that their fleet size would grow, and six percent said that their fleets would decrease. In 1991, 15 percent say there will be a decrease in the number of vehicles in their fleets during the coming year, registering the largest percentage change among these categories.

What Fleets Will Purchase

For commercial fleets, a total of 207 respondents said that they plan to purchase 51,970 vehicles in the1991-model year, with 76 percent of those being automobiles, 14 percent vans, and 10 percent light-duty trucks. Fleet managers indicated that their most important considerations when ordering new vehicles were, in order of importance:

1. Initial cost.
2. Job suitability.
3. Economy of operation.
4. Repair record.
5. Serviceability.
6. Safety record.
7. Depreciation/resale value.
8. Warranty program.
9. Order/delivery time.
10. Country of origin.
11. Company image/prestige.
12. Driver preference.

■Expected Average Initial Cost of a Single 1991-Model Year Vehicle

	Cars	Vans	Light-Duty Trucks
Banking/Finance	$11,194	$13,863	$16,250
Chemical &Petroleum	13,945	15,170	13,824
Consumer Marketing	13,150	14,045	13,033
Communications	10,680	14,575	15,333
Drugs & Cosmetics	13,381	14,621	15,311
Electronics	12,825	11,410	13,000
Food & Beverage	12,656	14,708	11,598
Industrial Manufacturing	13,606	14,985	15,538
Insurance	12,140	15,611	14,571
Service Organization	13,162	14,180	17,237
▲All Commercial Fleets	**$12,674**	**$14,316**	**$14,569**
▲Govt./Law Enforcement	**$11,845**	**$13,981**	**$13,983**
▲Public Utility	**$11,462**	**$13,366**	**$13,135**

Loyalty Prevails

Fleets also indicated that they plan to remain loyal to the vehicles they have ordered in the past, with 87 percent of commercial fleet respondents saying they do not plan to change the nameplate, size, or type of vehicle that they have ordered in the past.

However, when it comes to the equipment on those vehicles, it is another story. Fleets said that in about half of their cases (52 percent), manufacturer option package offerings had affected their selection of fleet vehicles.

A common complaint among 71 percent of the responding commercial fleets was that even though they reordered the same vehicles, option

FLEET ORDERS

■Number of 1991-Model Year Vehicles Expected to Puchase or Lease	Cars	Vans	Light-Duty Trucks	Total
Banking/Finance	593	61	27	681
Chemical & Petroleum	2,355	660	3,139	6,154
Consumer Marketing	2,019	945	236	3,200
Communications	362	247	76	65
Drugs & Cosmetics	9,311	1,215	180	10,706
Electronics	508	340	12	860
Food & Beverage	5,819	661	207	6,687
Industrial Manufacturing	4,693	1,547	714	6,854
Insurance	13,868	274	59	14,201
Service Organization	299	1,051	592	1,942
▲ Total Commercial Fleet	**39,727**	**7,001**	**5,242**	**51,970**
▲ Government/Law Enforcement	**7,061**	**660**	**1,465**	**9,189**
▲ Public Utility	**422**	**812**	**733**	**1,967**

packaging forced them to purchase more equipment than on past purchases. Seventeen percent said that they selected different models or manufacturers than they normally do, in order to obtain optional equipment packages that they wanted and five percent said that they selected the same vehicles that they otherwise would have, but were forced to take less equipment than they would have liked.

Commercial fleets also say their average cost of a new automobile has dropped slightly, from 1990's average cost of $12,854 to a 1991 average cost of $12,674. For vans, the average cost increased slightly from $14,272 to $14,316, but the price jump was not as large as last year's $926 jump from 1989 costs. For light-duty trucks, the average cost rose from $14,194 to $14,569; this compares to a $848 rise in price

■ Does Your Company Purchase or Lease Import Vehicles?	%Yes	%No	■If No, Why Not?* Company-written "domestic only" policy %	Company-perceived "domestic only" policy %	Personal preference of fleet management %	Driver preference %
Banking/Finance	0	100	45	22	22	0
Chemical & Petroleum	8	92	4	76	4	8
Consumer Marketing	7	93	9	67	25	8
Communications	0	100	17	33	17	0
Drugs & Cosmetics	30	70	16	42	0	0
Electronics	0	100	0	80	0	0
Food & Beverage	3	97	11	75	7	0
Industrial Manufacturing	11	89	39	52	6	0
Insurance	5	95	14	69	3	0
Service Organization	10	90	0	44	45	0
▲ All Commercial Fleets	**8**	**92**	**16**	**56**	**13**	**2**
▲Government/Law Enforcement	**4**	**96**	**20**	**38**	**5**	**0**
▲Public Utility	**0**	**100**	**15**	**55**	**15**	**0**

**Percentages do not equal 100 due to incomplete questionnaires*

from 1989 to 1990.

According to overall results, Ford/Lincoln-Mercury will gain the biggest share of fleet acquisitions among respondents, garnering 39 percent of the orders this spring, and edging out last year's fleet favorite, General Motors which will receive 35 percent of new vehicle orders. Chrysler will receive 22.3 percent of 1991-model fleet orders.

Import Penetration Increases

Import buying will increase among survey respondents for 1991, with 2.7 percent reporting that they plan to buy import vehicles, compared to one percent in 1990. Eight percent of the responding commercial fleets said that they currently purchase or lease import vehicles, but the overwhelming majority, 92 percent, said they do not.

When asked if they would *consider* buying or leasing an import vehicle, 42 percent of the commercial fleets said that they would not, with 14 percent saying they would. Thirty-four percent were unsure if they would consider an import. When asked why they felt this way about buying or leasing import vehicles, respondents said their attitudes reflected "a company-perceived domestic-only buying policy" (56 percent), "a company-written domestic-only policy" (16 percent), and "personal preference of fleet management" (13 percent). AF

■ If Manufacturer Option Packages Have Affected Vehicle Selection, Which Condition Applies?	Select same vehicles with more equipment %	Select same vehicles with less equipment %	Select different models or manufacturers because they offer desired optional equipment %	Other %
Banking/Finance	61	13	13	13
Chemical & Petroleum	61	13	13	13
Consumer Marketing	82	0	9	9
Communications	100	0	0	0
Drugs & Cosmetics	64	9	27	0
Electronics	100	0	0	0
Food & Beverage	70	0	15	15
Industrial Manufacturing	71	8	8	13
Insurance	82	6	6	6
Service Organization	20	0	80	0
▲All Commercial Fleets	**71**	**5**	**17**	**7**
▲Government/Law Enforcement	**95**	**0**	**5**	**0**
▲Public Utility	**75**	**25**	**0**	**0**

■ Ordering Changes Planned During Next Year*	Lease vehicles previously purchased %	Puchase vehicles previously leased %	Divest most of fleet to employee ownership %	Reduce number of vehicles in fleet %	Increse number of vehicles in fleet %	Other %	No substantial changes considered %
Banking/Finance	0	25	0	25	0	0	50
Chemical & Petroleum	0	4	0	13	13	21	58
Consumer Marketing	0	0	0	21	21	29	43
Communications	0	33	0	0	17	17	50
Drugs & Cosmetics	4	8	0	4	23	27	54
Electronics	0	0	0	20	20	20	60
Food & Beverage	0	14	0	17	14	17	48
Industrial Manufacturing	0	12	0	12	24	24	47
Insurance	0	12	0	24	17	19	43
Service Organization	0	11	0	11	22	0	56
▲Total Commercial Fleet	**4**	**12**	**0**	**14**	**17**	**17**	**51**
▲Government/Law Enforcement	**0**	**6**	**0**	**17**	**6**	**6**	**70**
▲Public Utility	**0**	**23**	**0**	**8**	**0**	**0**	**69**

**Percentages do not Equal 100 due to Multiple Responses*

Retabulating NAFA's Remarketing Survey

This article will break out the remarketing practices of commercial, public utility, and government/law enforcement fleets based on NAFA's recent remarketing survey so that results are specific to each of these three fleet categories.

The only reliable guide to the future is knowledge of the past. This is particularly true as it applies to the resale of company vehicles, which determines the ultimate success or failure of a fleet's vehicle program.

Fleet managers are required to select makes, models, and equipment, and must decide when to buy, and when and how to sell. Often, the only sources of information and guidance available to them is their own experience, discussion with their peers, and information provided in industry surveys such as this.

First and foremost, it is important to understand the purpose of surveys. Surveys identify trends and give a comparison base, but each company's unique fleet needs and requirements are the key factors in establishing remarketing goals and performance.

Automotive Fleet considers used-vehicle remarketing so important that it decided to prepare this follow-up article to the NAFA Used-Vehicle Remarketing Survey, published in the February 1991 issue of *Automotive Fleet*. This follow-up article retabulates these survey results by specific fleet categories, rather than drawing conclusions based on responses from all survey participants. In order to correctly interpret these retabulated results, however, some background information may be helpful:

■ **Chart 1.**

Number of Responding Fleets

Industry Classification	
Banking/Finance	2%
Chemicals & Petroleum	7%
Communications	2%
Consumer Manufacturing	5%
Drugs & Cosmetics	8%
Electronics	1%
Food & Beverage	8%
Insurance	12%
Industrial Manufacturing	6%
Service Organization	1%
Other	12%
▲ Total Commercial	64%
▲ Total Govt./Law Enf.	22%
▲ Total Public Utility	14%
■ Grand Total	100%

As reflected in the revised survey, there are three fleet categories that are highlighted. They are: commercial, government/law enforcement and public utility fleets. These fleet categories are defined, for the purposes of this article, as follows:

- **Commercial Fleets:** These are fleets operated by private enterprise companies that offer products or services for profit.
- **Public Utility Fleets:** These are quasi-government-type organizations that are subject to controls and restrictions which make them unlike any other type of fleet.
- **Government/Law Enforcement Fleets:** These groups are also subject to great scrutiny and control, which impacts their operation and management methods. In fact, law enforcement fleets could even be considered as a separate group because of their obviously unique fleet vehicle usage.

As it applies to these three types of fleets, purchasing fleet vehicles is invariably governed by four basic factors:

- Vehicle Usage.
- Vehicle Cost.
- Serviceability/Reliability.
- Resale Value/Depreciation.

It's also true that various industry groups within the commercial fleet segment have unique interests and usage where fleet operations are concerned. Knowing these basic facts makes it easier to understand why the survey responses from these fleets

have been presented separately for this article.

Remarketing Survey Highlights

As Chart 1 indicates, government/law enforcement fleets represent 22 percent of the total responses to the NAFA survey. Public utilities represent 14 percent, and commercial fleets account for 64 percent.

Company-owned or Leased?

Although the overall breakdown of all survey respondents in Chart 3 (page 104) shows 59 percent of their fleets as leased and 41 percent as company-owned, the combined weight of government, law enforcement, and public utility fleets (a combined 36 percent of total responding fleets) skews the figures for commercial fleets. By retabulating survey responses by fleet category, it shows that 57 percent of the responding commercial fleets are leased and 43 percent are owned.

A major consideration in the proper evaluation of resale data is the impact of company ownership versus leasing. While the company-owned fleets are responsible for their own sales, leased units are resold by the lessor, with the possible exception of some units sold to employees.

How were Vehicles Sold?

Sales of 1989-model year vehicles show that auctions predominate as the method of sale for the three groups. Commercial fleets, however, tend use wholesalers and employee sales more often than either government/law enforcement or public utility fleets. Commercial fleets and government fleets are remarkably similar in the type of vehicles they sell (both registered 74 percent automobiles), but public utility fleets skew the totals, because they sell approximately 24 percent light-duty trucks, as opposed to 12 and 14 percent light-duty trucks for commercial and government/law enforcement fleets, respectively.

■ **Chart 2.**

Average Months in Service	
Commercial Fleets	32
Govt./ Law Enf. Fleets	66
Public Utility Fleets	58

How Long are Vehicles Kept?

As Chart 2 indicates, government/law enforcement and public utility fleets have a disproportional effect on the average months-in-service for fleet vehicles, especially on automobiles. By retabulating the survey responses, the average service life is 32 months for commercial fleets, 58 months for public utility fleets and 66 months for government/law enforcement fleets. Mileage figures for each fleet category were unavailable.

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■ Chart 3.

Percent Company-Owned / Leased Vehicles

	Company Owned			Leased			Total		# Veh.
	Auto	Vans	Light Trucks	Auto	Vans	Light Trucks	Co.Owned	Leased	
Banking/Finance	37%	36%	35%	63%	63%	65%	37%	63%	672
Chemical & Petroleum	98%	74%	84%	4%	28%	16%	88%	12%	12,832
Communication	100%	0%	100%	0%	100%	0%	100%	0%	465
Consumer/Mfg	70%	48%	53%	30%	52%	47%	65%	35%	3,520
Drugs and Cosmetics	2%	9%	51%	98%	91%	49%	3%	97%	10,570
Electronics	1%	1%	0%	99%	99%	100%	1%	99%	1,785
Food and Beverage	25%	64%	74%	75%	36%	26%	48%	52%	9,391
Insurance	28%	95%	71%	72%	5%	29%	30%	70%	8,793
Industrial Manufacturing	4%	17%	51%	96%	83%	49%	17%	83%	6,136
Service Organization	38%	32%	100%	64%	68%	0%	41%	59%	2,487
Other	33%	59%	66%	67%	41%	34%	45%	55%	7,098
■ Total Commercial	**30%**	**41%**	**76%**	**70%**	**45%**	**24%**	**43%**	**57%**	**61,729**
■ Total Govt./Law Enforcement	**81%**	**70%**	**87%**	**19%**	**30%**	**13%**	**81%**	**19%**	**33,284**
■ Public Utility	**72%**	**67%**	**76%**	**28%**	**33%**	**24%**	**73%**	**27%**	**20,036**
■ Non-commercial Total	**51%**	**55%**	**79%**	**49%**	**45%**	**23%**	**59%**	**41%**	**115,051**

How Much is Spent on Recon?

Chart 4 was converted to percentages, as opposed to NAFA's original presentation by the number of respondents, to better emphasize the application of reconditioning expenses by fleet category. Commercial fleets are somewhat more likely to recondition vehicles before resale than are either government/law enforcement or public utility fleets. The average expenditure for commercial fleets falls between $0 and $300.

Chart 5 shows how many of each type of vehicle was sold through each method in 1989 (see page 106).

Respondents Determine Quality

The most frustrating aspect of surveys, as anyone who has ever tried to conduct one can appreciate, are the incomplete, illegible, and often unbelievable answers received from respondents. The next time you receive a survey questionnaire, please take the time to provide the requested information, in legible handwriting, and return it promptly so that accurate information on the fleet industry can be made available. AF

■ Chart 4.

Average Reconditioning Expense Per Vehicle

	$0	Less than $100	$101-$300	$301-$500	$501-$700	More than $700
Banking/Finance	100%	0%	0%	0%	0%	0%
Chemicals & Petroleum	56%	33%	0%	0%	11%	0%
Communications	0%	100%	0%	0%	0%	0%
Consumer/Manufacturing	40%	20%	40%	0%	0%	0%
Drugs & Cosmetics	0%	25%	62%	0%	0%	13%
Electronics	50%	0%	0%	50%	0%	0%
Food & Beverage	50%	10%	10%	20%	0%	10%
Insurance	31%	31%	32%	0%	6%	0%
Industrial Manufacturing	38%	37%	0%	25%	0%	0%
Service Organization	100%	0%	0%	0%	0%	0%
Other	54%	33%	13%	0%	0%	0%
▲ Total Commercial	**43%**	**27%**	**20%**	**5%**	**2%**	**2%**
▲ Total Govt./Law Enf.	**38%**	**35%**	**19%**	**8%**	**0%**	**0%**
▲ Total Public Utility	**36%**	**32%**	**32%**	**0%**	**0%**	**0%**
▲ Non-commercial Total	**39%**	**30%**	**21%**	**6%**	**2%**	**2%**

■ **Chart 5.**

How Many of Each Type of Vehicle was Sold Through Each Method in 1989?

	Autos*					Vans*					Light-Duty Trucks*				
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5
Banking/Finance	49%	45%	5%	0%	1%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%
Chemicals & Petroleum	20%	22%	8%	0%	50%	19%	23%	20%	19%	19%	26%	7%	25%	11%	30%
Communications	91%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%
Consumer Mfg.	36%	46%	17%	0%	1%	46%	42%	9%	3%	0%	20%	80%	0%	0%	0%
Drugs & Cosmetics	21%	53%	26%	0%	0%	21%	21%	18%	20%	19%	21%	22%	19%	19%	19%
Electronics	37%	83%	0%	0%	0%	30%	70%	0%	0%	0%	0%	0%	0%	0%	0%
Food & Beverage	28%	43%	28%	1%	0%	10%	0%	30%	0%	0%	8%	3%	89%	0%	0%
Insurance	27%	29%	29%	12%	3%	14%	0%	14%	0%	72%	33%	67%	0%	0%	0%
Industrial Manufacturing	36%	21%	42%	0%	19%	28%	18%	54%	0%	0%	54%	9%	33%	0%	4%
Service Organization	0%	39%	61%	0%	0%	33%	37%	30%	0%	0%	0%	100%	0%	0%	0%
Other	37%	53%	5%	3%	2%	17%	81%	0%	0%	2%	17%	66%	0%	59%	12%
▲ Total Commercial	**29%**	**43%**	**24%**	**2%**	**2%**	**23%**	**30%**	**26%**	**10%**	**11%**	**25%**	**27%**	**22%**	**10%**	**16%**
▲ Total Govt./Law Enf.	**8%**	**74%**	**15%**	**2%**	**1%**	**15%**	**71%**	**14%**	**0%**	**0%**	**8%**	**85%**	**7%**	**0%**	**0%**
▲ Total Public Utility	**39%**	**60%**	**1%**	**0%**	**0%**	**38%**	**51%**	**4%**	**1%**	**6%**	**42%**	**48%**	**2%**	**0%**	**8%**
■ Non-commercial Total	**24%**	**54%**	**19%**	**2%**	**1%**	**23%**	**42%**	**29%**	**7%**	**8%**	**28%**	**48%**	**11%**	**4%**	**9%**

*** 1 = Employees, 2 = Auctions, 3 = Wholesalers, 4 = New-Car Dealers, 5 = Used-Car Dealers**

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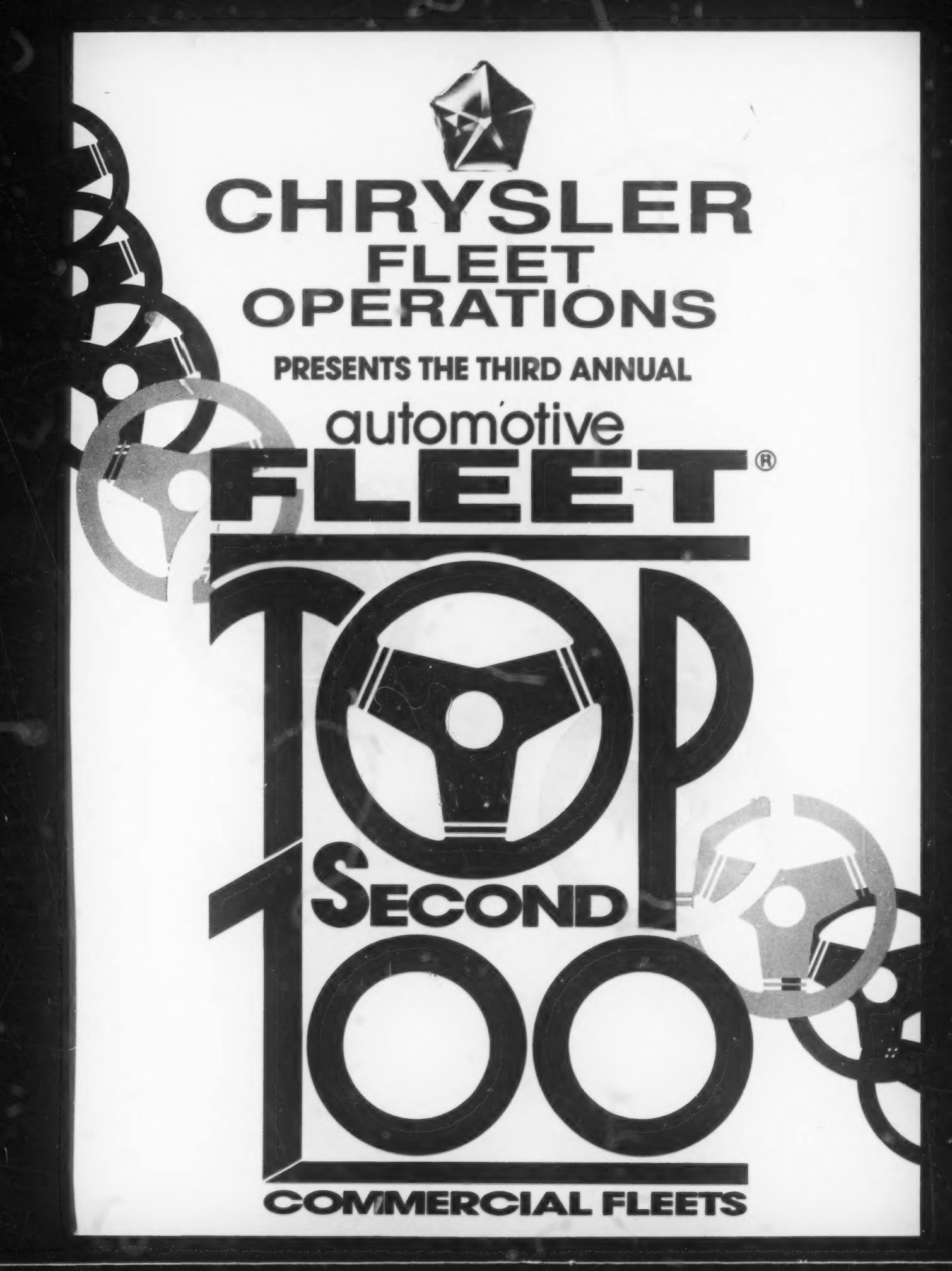
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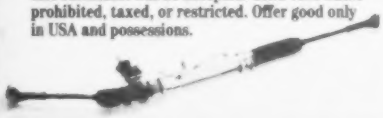

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FLEET RANKINGS

Top Second 100 Commercial Fleets

In order to qualify for the Top 100 and the Top Second 100 listings in *Automotive Fleet* magazine, a fleet must be a part of a business/corporate commercial fleet entity that has centralized automotive control. Companies operating driver reimbursement programs for employee-owned vehicles are not included.

Fleet size is verified by the *Automotive Fleet* research department by telephone and/or mail inquiry. Counted as a part of a fleet's total vehicles are company-controlled automobiles, vans, and trucks under 19,500 lbs. GVW. Not counted are lift trucks, trailers, or trucks larger than Class V.

Approximately 300 of the larger commercial fleet operations are selected from *AF*'s circulation list to be recipients of the Top 100 and Top Second 100 survey study for ranking. The 1991 Top 100 listing appeared in *AF*'s February 1991 issue.

Alphabetical Cross Index

COMPANY NAME	RANK	COMPANY NAME	RANK
Air Products & Chemicals, Inc	193	Kemper Group	157
Alco Standard Corp	155	Land O'Lakes, Inc	169
Alexander & Alexander	147	Legg's Products, Inc	140
Allstate Insurance Co	110	Liberty Mutual Insurance	123
American Cyanamid	160	Lorillard Tobacco Co	129
American Family Mutual Ins	176	Los Angeles Times	161
American Greetings	153	McDermott, Inc	196
American Int'l Realty Corp	151	Miles Laboratories, Inc	103
Amerigas	142	Montgomery Ward	118
Amtrak	159	Moore Business Forms	148
Apple Computer	170	Nalco Chemical Corp	166
Aratex Services	111	NCR Tech	135
ARKLA, Inc	194	Nestle Foods Corp	132
Automatic Data Processing	112	Ogden Allied Services Corp	109
Bank of America	134	Ohio Casualty Ins. Co	181
Beckman Instruments	185	Oxy USA Inc	182
Bell & Howell	175	Parker-Hannifin Corp	198
Borg-Warner	143	Perkin Elmer	191
Bridgestone/Firestone	138	Petrolane/Suburban Propane	195
Brown & Root USA	145	Philips Medical Systems	126
Cal Gas Corp	149	Picker International Co	164
Campbell Sales Co	154	Pillsbury Co	184
Centel Corp	107	Pinkerton Security & Investigation	190
Centerior Energy	146	PMI Food Equipment	141
CIBA-GEIGY Pharm	124	Quaker Oats Co	168
CNA Insurance	156	Reliance Electric Co	178
Continental Insurance	108	Roche Biomed. Labs	116
Control Data Corp	171	Rockwell Int. Corp	105
E.R. Squibb & Sons, Inc	120	S.C. Johnson & Son	136
Eaton Corp	121	Sandoz Pharmaceuticals	127
Electronic Data Systems	104	Schering-Plough	119
Environmental Industries, Inc	117	Siemens Nixdorf Telplus	192
Ferrellgas	180	Simplex Time Recorder	128
Fireman's Fund	167	St. Paul Fire & Marine Insurance	183
First American Financial Corp	189	Stroehmann Bakeries	114
Flagship Cleaning Services, Inc	200	Syntex Laboratories, Inc	152
Flowers Industries	172	Tektronix, Inc	188
FMC Corp	113	Texaco Inc., Central	122
GAB Business Services Inc	131	Texaco Trading & Transportation	144
Gencorp./General Tire	186	Thomas J. Lipton Co., Inc	187
General Foods USA	165	TRW/CSD	199
General Mills	115	TRW Info. Sys.	197
Hallmark Cards	133	Union Oil of California	162
Household Finance Corp	137	United Cable Television	177
Intracorp	173	USG Corp	163
James River Corp	101	USX Corp	102
J.I. Case Co	158	W.R. Grace & Co	130
Johnson & Johnson	125	Wausau Insurance	150
JR Simplot Co. Mining/Mineral	106	Weyerhaeuser Co	174
K-Mart Corp	179	Wickes Companies	139

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
101	117	James River Corp. Richmond, VA	Rita Stokes	—	ARI, PHH, Associates	1,900	0	1,900
102	40	USX Corp. Pittsburgh, PA	Don Hillwig	—	PHH	380	1,520	1,900
103	159	Miles Laboratories, Inc. Elkhart, IN	Debbie Bailey	—	GEC Fleet, Wheels	1,136	758	1,894
104	125	Electronic Data Systems Richardson, TX	Rich Piper	X	—	975	918	1,893
105	103	Rockwell Int. Corp. Pittsburgh, PA	Ken Campos	—	Southgate	1,750	125	1,875
106	—	JR Simplot Co. Mining/Mineral Pocatello, ID	Terry McLaughlin	X	—	125	1,740	1,865
107	—	Centel Corp. Chicago, IL	Bill Kintigh	X	—	112	1,750	1,862
108	97	Continental Insurance Cranbury, NJ	Jean Marie Albrecht Victor Kaplij		PHH	1,830	20	1,850
109	—	Ogden Allied Services Corp. New York, NY	Joe Smith	X	—	600	1,250	1,850
110	142	Allstate Insurance Co. Northbrook, IL	Donald Gorr	X	—	1,702	113	1,815
111	—	Aratex Services Encino, CA	Merritt Kinne	X	—	500	1,300	1,800
112	127	Automatic Data Processing Roseland, NJ	Mike Sankowitch	—	GEC Fleet	1,550	250	1,800
113	116	FMC Corp. Chicago, IL	Lawrence Dakof	X	GEC Fleet	700	1,100	1,800

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Trucks # Cars	Vans	Total
114	128	Stroehmann Bakeries Horsham, PA	Dale Stevens	X	PHH	185	1,600	1,785
115	133	General Mills Minneapolis, MN	Henry Paetzel	X	—	1,478	287	1,765
116	139	Roche Biomed Labs Burlington, NC	Jane Crabbe	—	Wheels	1,659	98	1,757
117	—	Environmental Industries, Inc. Calabasas, CA	Bill Johnson	X	—	200	1,550	1,750
118	105	Montgomery Ward Chicago, IL	Roseann Neveitt	—	GEC Fleet, PHH	190	1,560	1,750
119	141	Schering–Plough Kenilworth, NJ	Robert Keckeissen	—	PHH	1,700	35	1,735
120	132	E.R. Squibb & Sons, Inc. Princeton, NJ	Jeff Zielinski	—	PHH	1,693	41	1,734
121	134	Eaton Corp. Cleveland, OH	Robert J. Wagner	—	LMV, GEC Fleet	1,312	408	1,720
122	—	Texaco Inc., Central Houston, TX	Bernie Bryl	—	PHH	285	1,430	1,715
123	129	Liberty Mutual Insurance Boston, MA	Barbara Feinberg	X	—	1,661	46	1,707
124	161	CIBA–GEIGY Pharm. Summit, NJ	Barbara Bell	—	PHH	1,535	165	1,700
125	137	Johnson & Johnson New Brunswick, NJ	Joyce Donini	—	PHH	1,500	200	1,700
126	138	Philips Medical Systems Shelton, CT	Rose Ruchin	—	PHH	1,500	200	1,700

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
127	131	Sandoz Pharm. East Hanover, NJ	Barbara Eutsler	—	Wheels, Emkay	1,663	28	1,691
128	140	Simplex Time Recorder Gardner, MA	Jerry Albertini	—	Wheels	911	779	1,690
129	143	Lorillard Tobacco Co. New York, NY	Sal Giacchi	—	GEC Fleet, PHH, Wheels	380	1,305	1,685
130	—	W.R. Grace & Co. New York, NY	J. W. Enterline	—	PHH, USFL	395	1,290	1,685
131	135	GAB Business Services Inc. Parsippany, NJ	G.J. Keenan	—	GEC Fleet, PHH	1,648	8	1,656
132	180	Nestle Foods Corp. Purchase, NY	Jack Stellabotte	X	—	1,150	500	1,650
133	148	Hallmark Cards Kansas City, MO	Debbie Mize	X	—	1,560	70	1,630
134	130	Bank of America Concord, CA	Tom Martin	X	—	1,120	505	1,625
135	136	NCR Tech. Dayton, OH	Anne Mangen	—	GEC Fleet, Wheels	425	1,200	1,625
136	197	S.C. Johnson & Son Racine, WI	Karen Fries Mike Tranchida	X	—	600	1,017	1,617
137	149	Household Finance Corp. Prospect Heights, IL	Kris Ernstmeyer	X	ARI	1,555	60	1,615
138	145	Bridgestone/Firestone Chicago, IL	Mel Martin	X	—	600	1,000	1,600
139	147	Wickes Companies Santa Monica, CA	Ron Aimhein	—	Associates	1,098	486	1,584

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
140	155	Legg's Products, Inc. Winston–Salem, NC	Andy T. Collins	—	PHH	200	1,380	1,580
141	—	PMI Food Equipment Troy, OH	Mark Welty	X	—	508	1,061	1,569
142	—	Amerigas Sacramento, CA	Jim Stevens	X	—	100	1,451	1,551
143	—	Borg–Warner Chicago, IL	Phyllis Howard	—	In-house	200	1,345	1,545
144	—	Texaco Trading & Transportation Denver, CO	Donna Olinovich	—	PHH	760	770	1,530
145	124	Brown & Root USA Houston, TX	Roger D. Ivey	X	—	175	1,350	1,525
146	—	Centerior Energy Independence, OH	Jack Sedio Tom Allen	X	—	212	1,296	1,508
147	153	Alexander & Alexander Baltimore, MD	Barbara Medley	X	—	1,500	0	1,500
148	154	Moore Business Forms Glenview, IL	Chuck Blaise	—	ARI	1,500	0	1,500
149	—	Cal Gas Corp. Sacramento, CA	Jimmy Todal	X	—	30	1,451	1,481
150	157	Wausau Insurance Wausau, WI	Robert Rakow	X	GEC Fleet, USFL	1,460	20	1,480
151	163	American Int'l Realty Corp. Manchester, NH	Edward L. Rogers	X	—	1,463	6	1,469
152	169	Syntex Laboratories, Inc. Palo Alto, CA	R.A. Schlossareck	—	ARI, Wheels	1,307	162	1,469

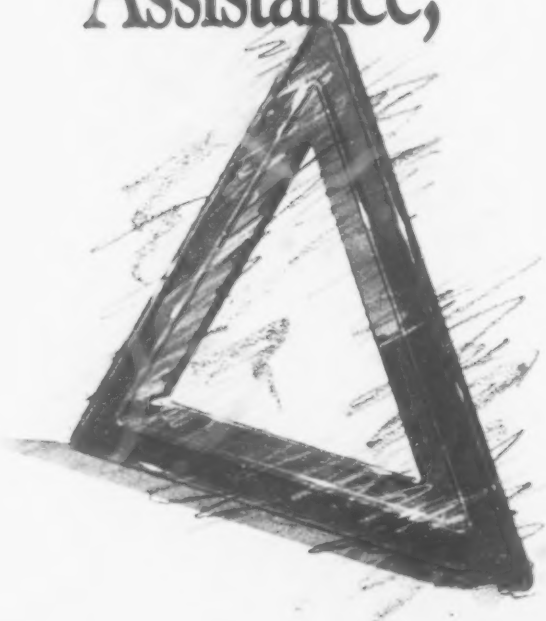
FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
153	158	American Greetings Cleveland, OH	Gene Lusnek	—	LMV, PHH	1,400	50	1,450
154	164	Campbell Sales Co. Camden, NJ	Charles Schnerr	—	Wheels	1,330	90	1,420
155	162	Alco Standard Corp. Valley Forge, PA	Jo Ann Tripp	—	Wheels, Avis	1,036	375	1,411
156	190	CNA Insurance Chicago, IL	Michael Wagner	X	Wheels, GEC Fleet	1,381	0	1,381
157	166	Kemper Group Long Grove, IL	Frank Pastorino	X	—	1,365	12	1,377
158	—	J.I. Case Co. Racine, WI	Bill McNellis	X	—	325	1,050	1,375
159	—	Amtrak Philadelphia, PA	Ed Stuhl	X	—	100	1,257	1,357
160	181	American Cyanamid Wayne, NJ	Robert DeFeo	—	ARI, PHH, Wheels	1,300	0	1,300
161	—	The Los Angeles Times Los Angeles, CA	Cletus Page	X	—	650	650	1,300
162	170	Union Oil of California Los Angeles, CA	Ken Cgata	X	—	1,300	0	1,300
163	111	USG Corp. Chicago, IL	Mary Sabathne	—	ARI, Donlen	1,000	300	1,300
164	171	Picker International Co. Highland Heights, OH	Betty Strader	X	—	1,249	50	1,299
165	86	General Foods USA White Plains, NY	Joy Bloech	X	PHH	1,200	75	1,275

FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
166	186	Nalco Chemical Corp. Naperville, IL	Yvonne Bonahoom	—	PHH	950	300	1,250
167	150	Fireman's Fund Ins. Novato, CA	Sylvia Jones	X	PHH	1,228	13	1,241
168	174	The Quaker Oats Co. Barrington, IL	Linda Tegmeyer	—	Associates	1,170	50	1,220
169	185	Land O'Lakes, Inc. Minneapolis, MN	Bruce Charon	—	Farmcredit, GEC Fleet	850	357	1,207
170	—	Apple Computer Cupertino, CA	Lillian Ferrell	—	GEC Fleet PHH	1,200	0	1,200
171	115	Control Data Corp. Minneapolis, MN	Kathleen Webster	—	McCullagh, GEC Fleet	300	900	1,200

Roadside Assistance,



Food And Lodging,

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
172	114	Flowers Industries Thomasville, GA	Mark Worthey	X	—	0	1,200	1,200
173	175	Intracorp Berwyn, PA	Pat Kays	—	PHH	1,200	0	1,200
174	176	Weyerhaeuser Co. Tacoma, WA	Donna McKivor	—	Nickerson	800	400	1,200
175	160	Bell & Howell Skokie, IL	Mike Winfield	—	Wheels	1,150	40	1,190
176	189	American Family Mutual Ins. Madison, WI	Gray Perrett	X	—	1,123	52	1,175
177	—	United Cable Television Denver, CO	Richard Belkie	X	—	75	1,100	1,175

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FLEET RANKINGS

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
178	—	Reliance Electric Co. Cleveland, OH	Phil Tedeschi	—	PHH, GEC Fleet	409	741	1150
179	173	K–Mart Corp. Troy, MI	Alice Schurrer	X	—	992	147	1,139
180	—	Ferrellgas Liberty, MO	Val Dois	X	—	81	1,021	1,102
181	184	Ohio Casualty Ins. Co. Hamilton, OH	G. Michael Ulreich	X	—	1,095	5	1,100
182	193	Oxy USA Inc. Tulsa, OK	Bill Jeffers	—	Wheels	180	912	1,092
183	192	St. Paul Fire & Marine Insurance St. Paul, MN	Paul King	—	GEC Fleet, ARI	1,058	6	1,064
184	83	Pillsbury Co. Minneapolis, MN	John Christensen	—	GEC Fleet	785	275	1,060
185	195	Beckman Instruments Fullerton, CA	Patty Whitchurch	X	PHH, Wheels GEC Fleet	270	780	1,050
186	—	Gencorp/General Tire Akron, OH	Bob Klausman	X	—	350	650	1,000
187	181	Thomas J. Lipton, Inc. Englewood Cliffs, NJ	Bill Benzie	—	GEC Fleet	990	10	1,000
188	172	Tektronix, Inc. Beaverton, OR	Johnnie Schmauder	X	—	800	174	974
189	—	First American Financial Corp. Santa Ana, CA	John Buehler	—	PHH	968	0	968
190	200	Pinkerton Security & Investigation Van Nuys, CA	Andrew Eichner	—	USFL	617	309	926

'91 RANK	'90 RANK	Company Name & Headquarters	Fleet Contact	Co. Owned	Lessors	# Cars	# Trucks Vans	Total
191	194	Perkin Elmer Norwalk, CT	Richard Fisher	—	GEC Fleet, PHH	800	100	900
192	183	Siemens Nixdorf/Telplus Boca Raton, FL	Robert Morris	—	ARI, Mike Albert Leasing	300	600	900
193	—	Air Products & Chemicals, Inc. Allentown, PA	Doug Buffington	X	GEC Fleet, Wheels	550	300	850
194	—	ARKLA Inc. Shreveport, LA	Joe Lions	X	—	50	800	850
195	—	Petrolane/Suburban Propane Whippany, NJ	Wally Euart	X	—	200	625	825
196	177	McDermott, Inc. Barbertown, OH	Marty Sellars	X	—	480	320	800
197	—	TRW Info. Sys. Orange, CA	Janis Christensen	—	Wheels, GEC Fleet	720	80	800
198	198	Parker–Hannifin Corp. Cleveland, OH	Bridget O'Neill	—	GEC Fleet, McCullagh	600	100	700
199	199	TRW/CSD Fairfield, NJ	Carol Mitchell Harry Francisco	—	USFL	216	435	651
200	—	Flagship Cleaning Services, Inc. Philadelphia, PA	Roland Brauch	X	ARI, Chrysler Finance, Hansen	200	434	634

TOTAL CARS: 87,071

TOTAL TRUCKS & VANS: 54,149

TOTAL VEHICLES: 141,220

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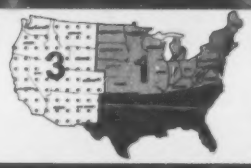
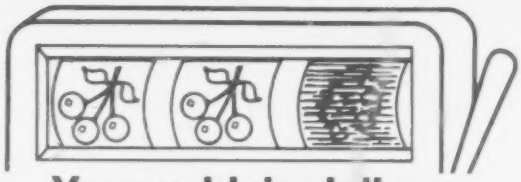
USED-CAR PRICES

The following are average used-car prices for the period ending March 1 1991. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.



89 BUICK SKYHAWK			
Coupe	5,512	5,565	5,391
Sedan	5,587	5,644	5,475
88 BUICK SKYHAWK			
Coupe	4,518	4,564	4,428
Sedan	4,580	4,626	4,490
90BUICK SKYLARK			
Cust Sedan	7,602	7,677	7,451
89 BUICK SKYLARK			
Cust Sedan	6,395	6,460	6,268
90 BUICK CENTURY			
Cust Sedan	8,270	8,353	8,103
89 BUICK CENTURY			
Cust Sedan	6,606	6,672	6,474
90 BUICK LESABRE			
Cust Sedan	10,961	11,071	10,743
89 BUICK LESABRE			
Cust Sedan	8,589	8,675	8,416
90 CADILLAC DEVILLE			
Coupe	16,810	16,979	16,476
Sedan	16,982	17,152	16,642
89 CADILLAC DEVILLE			
Coupe	14,416	14,559	14,128
Sedan	14,573	14,721	14,282
90 CADILLAC SEVILLE			
Sedan	17,747	17,923	17,390
89 CADILLAC SEVILLE			
Sedan	14,646	14,793	14,353
90 CHEVY BERETTA			
Coupe	7,504	7,578	7,352
89 CHEVY BERETTA			
Coupe	6,292	6,357	6,167
90 CHEVY CORSICA			
Hatchback 5 Dr.	7,341	7,416	7,196
89 CHEVY CORSICA			
Sedan	5,996	6,056	5,876
90 CHEVY CAVALIER			
Sedan	6,411	6,477	6,284
89 CHEVY CAVALIER			
Sedan	5,105	5,157	5,004
89 CHEVY CELEBRITY			
Sedan	6,091	6,152	5,969
88 CHEVY CELEBRITY			
Sedan	4,812	4,860	4,717
90 CHEVY CAPRICE			
Sedan	8,815	8,903	8,639
88 CHEVY CAPRICE			
Sedan	6,909	6,979	6,770
90 CHRYSLER LE BARON			
Sedan	9,575	9,670	9,385
89CHRYSLER LE BARON			
Highline Sedan	6,252	6,314	6,125
90 CHRYSLER NEW YORKER			
Salon Sedan	11,460	11,574	11,232
89 CHRYSLER NEW YORKER			
Sedan	9,825	9,923	9,629
89 CHRYSLER FIFTH AVENUE			
Sedan	9,889	9,984	9,688
88 CHRYSLER FIFTH AVENUE			
Sedan	7,906	7,987	7,748
89 DODGE ARIES AMERICA			
Sedan	4,815	4,862	4,717
88 DODGE ARIES AMERICA			
Sedan	3,778	3,817	3,702
90 DODGE SHADOW			
Liftbk 5 Dr	6,405	6,471	6,279
89 DODGE SHADOW			
Liftbk 5 Dr	5,184	5,234	5,080
90 DODGE DYNASTY			
Sedan	8,950	9,040	8,770
90 FORD ESCORT			
Htchbk 4 Dr LX	5,510	5,666	5,497
89 FORD ESCORT			
Htchbk 4 Dr LX	4,475	4,519	4,385
90 FORD MUSTANG			
LX-4 Coupe	7,412	7,487	7,266
89 FORD MUSTANG			
LX-4 Coupe	5,969	6,027	5,848
90 FORD TEMPO			
GL Sedan 4 Dr	6,707	6,775	6,573
89 FORD TEMPO			
GL Sedan 4 Dr	5,303	5,356	5,197
90 FORD TAURUS			
GL Sedan 4 Dr	9,168	9,260	8,987
89 FORD TAURUS			
GL Sedan 4 Dr	6,977	7,047	6,835
90 FORD CROWN VICTORIA			
Sedan	11,322	11,436	11,095
89 FORD CROWN VICTORIA			
Sedan	9,185	9,276	9,002
90 THUNDERBIRD			
Coupe	9,964	10,064	9,765
89 THUNDERBIRD			
Coupe	8,302	8,384	8,135
90 LINCOLN			
Town Car Sedan	17,179	17,350	16,836
Mark VII LSC Coupe	16,726	16,894	16,391
Continental Sedan	15,852	16,011	15,534
89 LINCOLN			
Town Car Sedan	13,021	13,153	12,761
Mark VII LSC Coupe	14,134	14,276	13,853
Continental Sedan	14,067	14,208	13,786
90 MAZDA 626			
LX Sedan 4 Dr	10,332	10,436	10,127
90 MERCURY COUGAR			
LS Coupe	10,431	10,534	10,220
89 MERCURY COUGAR			
LS Coupe	8,729	8,816	8,555
90 MERCURY TOPAZ			
GS Sedan 4 Dr	6,858	6,928	6,723
89 MERCURY TOPAZ			
GS Sedan 4 Dr	5,445	5,499	5,336
90 MERCURY SABLE			
GS Sedan 4 Dr	9,256	9,349	9,071
89 MERCURY SABLE			
GS Sedan 4 Dr	7,031	7,101	6,889
90 MERCURY GRAND MARQUIS			
GS Sedan	11,768	11,885	11,533
89 MERCURY GRAND MARQUIS			
GS Sedan	9,649	9,745	9,456
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,191	6,253	6,068
89 MITSUBISHI MIRAGE			
Sedan 4Dr	4,879	4,928	4,782
90 NISSAN SENTRA			
Sedan 2 Dr	5,543	5,599	5,433
90 NISSAN STANZA			
XE Sedan 4 Dr	9,217	9,309	9,033
90 NISSAN MAXIMA			
SE Sedan	14,666	14,813	14,373
89 NISSAN SENTRA			
Sedan 2 Dr	4,236	4,276	4,151
89 NISSAN STANZA			
Ntch 4 Dr	7,215	7,287	7,071
89 NISSAN MAXIMA			
SE Sedan	12,303	12,426	12,058
90 OLDS CIERA			
S Coupe	8,335	8,419	8,168
Sedan	7,983	8,064	7,825
89 OLDS CIERA			
Coupe	6,533	6,599	6,402
Sedan	6,606	6,672	6,474
90 OLDS CALAIS			
Sedan	6,758	6,824	6,623
89 OLDS CALAIS			
Sedan	6,758	6,824	6,623
90 OLDS CUTLASS SUPREME			
Coupe	9,085	9,177	8,904
89 OLDS CUTLASS SUPREME			
Coupe	7,295	7,369	7,149
90 OLDS 98 REGENCY			
Sedan	13,789	13,930	13,515
89 OLDS 98 REGENCY			
Sedan	10,629	10,736	10,415
89 PLYMOUTH RELIANT			
Sedan	4,791	4,839	4,695
88 PLYMOUTH RELIANT			
Sedan	3,778	3,816	3,704
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	6,405	6,471	6,279
89 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,184	5,234	5,080
89 PLYMOUTH GRAN FURY			
Salon Sedan	5,008	5,059	4,909
88 PLYMOUTH GRAN FURY			
Salon Sedan	4,004	4,043	3,924
90 ACCLAIM			
Sedan	7,213	7,286	7,070
90 PONTIAC SUNBIRD			
LE Sedan	6,574	6,639	6,440
SE Coupe	6,791	6,861	6,655
89 PONTIAC SUNBIRD			
LE Coupe	5,416	5,470	5,307
SE Sedan	5,561	5,618	5,451
90 PONTIAC 6000			
LE Sedan	8,377	8,460	8,207
89 PONTIAC 6000			
LE Sedan	6,305	6,367	6,179
90 PONTIAC GRAND AM			
LE Sedan	7,566	7,644	7,416
89 PONTIAC GRAND AM			
Sedan	6,319	6,382	6,193
90 PONTIAC BONNEVILLE			
LE Sedan	10,997	11,108	10,776
89 PONTIAC BONNEVILLE			
LE Sedan	8,415	8,497	8,247
90 PONTIAC GRAND PRIX			
Coupe	9,393	9,486	9,205
89 PONTIAC GRAND PRIX			
Coupe	7,428	7,504	7,279
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	7,649	7,726	7,497
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,802	9,899	9,605
90 TOYOTA CRESSIDA			
Lux Sedan	15,537	15,692	15,226
89 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,312	6,376	6,186
89 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	8,057	8,137	7,894
89 TOYOTA CRESSIDA			
Lux Sedan	13,186	13,317	12,922
90 VOLKSWAGEN JETTA			
Sedan 4 Dr	8,399	8,482	8,230
89 VOLKSWAGEN JETTA			
Sedan 4 Dr	7,172	7,243	7,028
90 VOLVO			
240 DL Sedan	12,549	12,674	12,297
89 VOLVO			
240 DL Sedan	11,229	11,343	11,005

Taking a chance on some things can be exciting.



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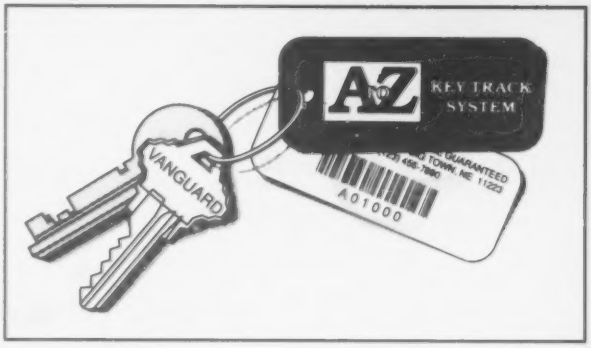

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GAS PRICES

UNLEADED GAS
Cost Per Gallon

City	Full-Serve	Self-Serve
Pine Bluff, AR	133.9¢	98.4¢
Tucson, AZ	139.7	117.2
Santa Ana, CA	159.9	89.9
New Haven, CT	137.2	117.7
Augusta, GA	143.9	95.2
Des Moines, IA	159.4	102.9
Salina, KS	131.4	97.9
Shreveport, LA	141.9	108.9
Jackson, MI	152.0	99.9
Kansas City, MO	132.0	93.0
Grand Forks, ND	127.4	98.9
Pittsburgh, PA	135.7	109.9
Corpus, Christi, TX	127.9	99.4
Milwaukee, WI	136.2	101.5
Seattle, WA	147.8	112.6

The average U.S. full-serve gasoline price for the month of March was 135.2 cents per gallon.
The average U.S. self-serve gasoline price for the month of March was 110.7 cents per gallon.
Survey conducted during the first five working days of March 1990.
Supplied by Runzheimer International, Runzheimer Park, Rochester, WI.